

DRAFT

Request for Proposal Development of a Comprehensive Business Plan for the California Indian Heritage Center

CONTRACT REQUIREMENTS

1. Contractor shall provide a sealed written proposal and separate costs for Part 1 and Part 2 of work described below.
2. Contractor shall coordinate with consultants and California State Parks staff currently engaged in the Master Planning (EDAW) and Financial Feasibility Study (MVP) for the California Indian Heritage Center Project. (See Attachment A - Scope of Work Attachment for Existing Services)
3. Part 1 – Schedule shall commence at the time of contract award. Part 2 - Schedule shall coincide with the ongoing Master Planning that is driven by the site selection schedule.

RELEVANT EXPERIENCE

1. Contractor shall have demonstrated knowledge of sovereignty issues and cultural protocols that relate to California Indian Tribes.
2. Contractor shall have demonstrated knowledge and success in the development of governance, marketing and business plans for similar cultural centers.

BUSINESS PLAN DEVELOPMENT

The purpose of this agreement will be to develop a comprehensive Business Plan for the development and operation of the newly established California Indian Heritage Center (CIHC). This plan must include a complete analysis of the CIHC from concept to ongoing operation on several levels as outlined below.

Contractor will work with the California Indian Heritage Center Task Force, California State Parks and their consultants, the new nonprofit Board, and other stakeholders in defining how the CIHC can come into existence and raise funds to build the CIHC, and then evolve over time into an organization capable of operating the facility for the long term. The contractor will consider the strengths and weaknesses of developing such a center, define for all stakeholders the fund development approach necessary for success in building such a facility, analyze the key museum holdings which would form the museum's core collection, develop a financial pro forma for the operation of the facility for the long term, and define the strategic direction for the CIHC from now to opening and beyond.

Business Plan Components:

- Governance and Management Plan
- Communications and Marketing Plan
- Fund Development Program for Design and Construction
- Fund Development Plan and Financial Pro Forma for Ongoing Operations

Part 1

A. Governance and Management Plan

- a. Define Organizational Structure
 - Nonprofit structure - incorporating 501(c)3 will be complete in Spring 2006
 - Define governance structure between Department of Parks and Recreation (DPR), the Native American Heritage Commission (NAHC) and CIHC, and role of any other stakeholders in the governance of the CIHC
- b. Define Board composition and roles and responsibilities of Board members in such functions as:
 - Fund Development
 - Finance/Investment Management
 - Administration
 - Communications/Marketing
 - Operations
- c. Develop Staffing Plan in conjunction with State Parks leadership including:
 - Staff transition plan from State Indian Museum (SIM) to CIHC
 - Long term staffing plan for new Center
 - Operations plan for the Center
 - Volunteer program
- d. Define Collections Management issues including:
 - Ownership of Collections
 - Role of all stakeholders in the care and management of collections
 - Develop Scope of Collections and Collecting Plan for CIHC

Part 2

A. Communications and Marketing Plan

- a. Marketing and Identity Plan
 - Develop "brand" identity in consultation with new nonprofit and Ca State Parks, and in consultation with EDAW (see Attachment A for EDAW scope of work)
 - Develop a clear communications plan to guide messages from concept to opening of center
 - Develop Strategic Plan for communications and marketing including defining market in consultation with MVP consultant (see attachment A for MVP scope of work)
 - Public relations and Advertising
 - Event planning
 - Marketing Partnerships and Collaborations

B. Fund Development Plan

- a. Identify fundraising objectives
 - Identify both public and private sources of funding for Capital Campaign: land acquisition, planning, design, construction, operation
 - Develop fundraising strategy and message
- b. Develop constituencies for fund development program which identifies potential donors, both public and private, including, but not limited to:
 - General Public/individuals
 - Corporate/Business Leaders, corporate donations
 - Indian tribes
 - Philanthropic organizations
 - Government
 - Other Stakeholders and Potential Givers
- c. Define types of fundraising methods and feasibility
 - Membership Program
 - Sponsorship Opportunities
 - Earned Income Sources
 - Investment Revenue Potential
 - Planned Gifts
 - Events
 - Other
- d. Define roles and responsibilities of CIHC Board and other stakeholders in fund development for design and construction, as well as for long term fiscal sustainability of the Center
- e. In consultation with MVP consultant, identify additional annual appropriation needs and funding potential including identification of revenue generation possibilities and feasibility
- f. Identify endowment size and sources to ensure fiscal sustainability for minimum 20 year operating period and beyond.

ATTACHMENT - A

SCOPE OF WORK ATTACHMENT FOR EXISTING SERVICES

(Coordinate with contractors under current contract as listed below)

A. Market Value Planners (MVP)

Contracted Scope of Work
Financial Feasibility Study

Task 1: Estimate Site Based Capital Development Costs

Task 2: Estimate Program Based Organization and Development Costs

- Soft cost estimates for organization and staffing
 - a. Start up phase of operation
 - b. Adjustments to staffing and organization plan for full build out
 - c. Assemble comparative organization cost data from similar operations and adjust to area

Task 3: Estimate Project Revenues from Operations and Other Sources

- Operating revenues from admissions, concession operations, special events
- Visitor volume and prevailing fee structure data at similar operations to estimate annual operating revenues
- Other revenue sources such as grants, fund raising efforts, local, State, Federal support programs

Task 4: Project Pro Forma Statements of Operating and Financial Position from

- Pro forma statements from start-up through stabilized operations, ten years forward
 - a. Pro forma statements structured for comparison of similar institutions
 - b. Evaluate range of financial operating ratios reflective of industry practices
 - c. Operating, balance sheets, cash-flow measures
 - d. Alternative financing structures for visitor volume, fee structure alternatives, program and staffing alternatives
 - e. Test impacts of development and phasing

Task 5: Financial Analysis of Alternative Funding Approaches

- Identify and model expected debt service capacity and operating configurations

Task 6: Final Report

- Document findings and recommendations
- Recommendations for site, program and phasing plan options.

B. EDAW

Contracted Scope of Work
Site and Facility Master Plan

Task 5: Phasing and Implementation

- Statement of probable cost for framework plan and site options
- Cost estimate for preferred option Master Plan, including clean up, prep, construction, site improvements, amenities
- Cost estimate for ongoing operations and maintenance costs
- Phasing plan and strategy for project development